Agency User Guide





AssetWORKS

November 2013

Login To Assetworks

www.nd.gov/surplus

Contents

| About the Guide | 3 |
|--|----|
| Getting Started | 3 |
| Accessing Assetworks | 3 |
| State Surplus Transfers | 5 |
| Creating a Surplus | 5 |
| Surplus Detail | 6 |
| Adding Asset/Property to a Surplus | 7 |
| Adding Images | 10 |
| Removing Assets from Surplus | 11 |
| Print Labels | 11 |
| Approving Surpluses | 12 |
| Reports | 13 |
| Web Surplus | 14 |
| Viewing/Searching Items in Web Surplus | 14 |
| View Item Details | 14 |
| Logging into Web Surplus | 15 |
| Placing Items on Hold | 16 |
| Removing Items from Hold | 17 |
| Create a Shopping List (Wants) | 17 |
| Support | 18 |
| Installing Crystal Report ActiveX | 19 |
| Installation of Fonts for Barcode Labels for Windows 7 | 21 |
| Download Barcode Label Fonts | 21 |
| Install Barcode Label Fonts | 21 |
| Commonly Used NSN Group Code | 22 |

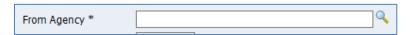
About the Guide

This guide is setup for Agency Users to utilize and reference for understanding the various processes throughout the system. Also, there are tips to give users insight on best practices within the system.

Getting Started

Here's a list of "need to know" functionality that is available throughout the system depending what screen or process is involved.

- An * next to any field in the system means that that field is required.
- Anytime you see the magnifying glass icon,
 it means that the field is a lookup field.

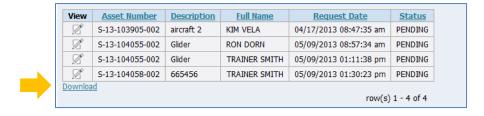


Users can start typing in the name of the agency just by clicking in the field and starting to type part of the agency name. Users can also click the magnifying glass icon to see a list of all available options in that field.

• Date fields are in this layout: MM/DD/YYYY. Users can enter date as 5/1/2013 or 05/01/2013 or use the Calendar selection.

*NOTE: the / (slashes) are required when entering the date manually.

Any time you see the download link under a list it means the list is downloadable to Excel.



Accessing Assetworks

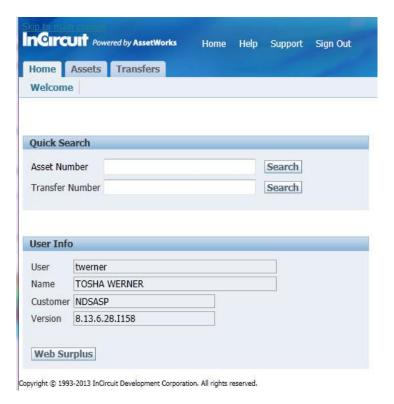
Registered users can access the system from: http://www.nd.gov/surplus/forms/.

- *Note: Users must use Internet Explorer browser to access Assetworks.
- **Note: Users with NDGOV logins should use their state Active Directory username and password.



***Note: The first time users with NDGOV logins access the system, only a "Home" tab will be available until your security has been assigned by a Surplus Property staff member. User will be notified by email when their access has been assigned. Please allow 24-48 hours for security roles to be assigned.

Users will now see the Welcome/Home Screen similar to the one below.



The top of the screen contains the following links:

Home - Returns users to the main Welcome page.

Help - Opens a window with additional help about the current screen.

Support - Opens a window that allows users to send a message or question to AssetWorks technical support staff.

Sign Out - Signs users out of the application when they are finished.

Quick Search Menu- Enter any portion of an asset or transfer number and then press the Search button to retrieve a list of matching assets or surplus transfers.

User Info - Displays information related to the current user account. Users without a NDGOV login can change their password at any time. All users can view the Web Surplus site by clicking the Web Surplus button.

*Note: You will be automatically logged out of AssetWorks and logged into Web Surplus. For further information on Web Surplus, please see the Web Surplus section of this guide.



State Surplus Transfers

This screen allows users to create new surplus transfers and search for existing transfers.

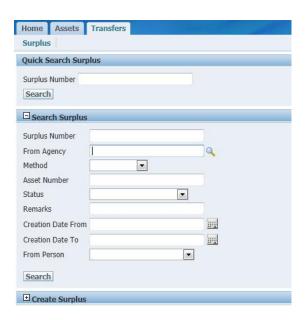
Quick Search Transfers

To quickly search for an existing surplus transfer by its Surplus Transfer Number, enter a Surplus Number into the field and press the Enter key or click the Search button.



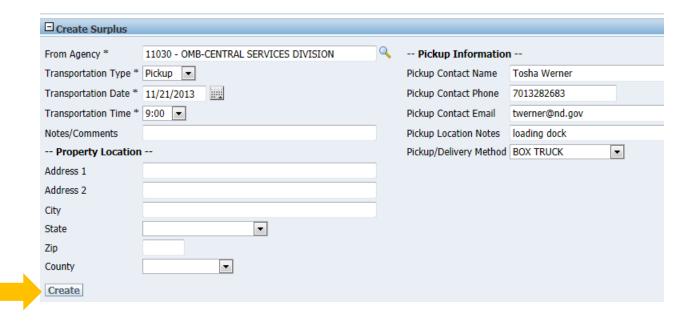
Search Surplus

To refine your search of existing surplus transfers, click the plus icon on the Search Surplus region. This will open up the region and allow you to specify additional criteria.



Creating a Surplus

To create a new surplus transfer for one or more assets, click the plus icon on the Create Surplus region. Enter relevant and required information then click the Create button.



From Agency: Enter the From Agency.

*Note: Your assigned agency will be the default. Users can only create Surplus Transfers for their assigned agency(s).

Transportation Type: Choose either Delivery or Pickup.

*Note: If pickup is selected; you must continue to call Surplus Property to schedule the pickup.

Transportation Date: Enter the date the transfer will be available for pickup/delivery.

*Note: Existing pickup schedules from your location will not be changed.

Transportation Time: Specify time transfer will be available for pickup or delivered to Surplus Property. *Note: Existing pickup schedules from your location will not be changed.

Notes/Comments: Enter any notes or comments into this field.

Property Location: These address fields will default from the logged in user's agency location. These fields are used to inform Surplus staff where the property is located within your agency.

Pickup Contact Name: Enter the Contact Name of the person to contact regarding this surplus.

Pickup Contact Phone: Enter the Contact's phone number.

Pickup Contact Email: Enter the Contact's email address.

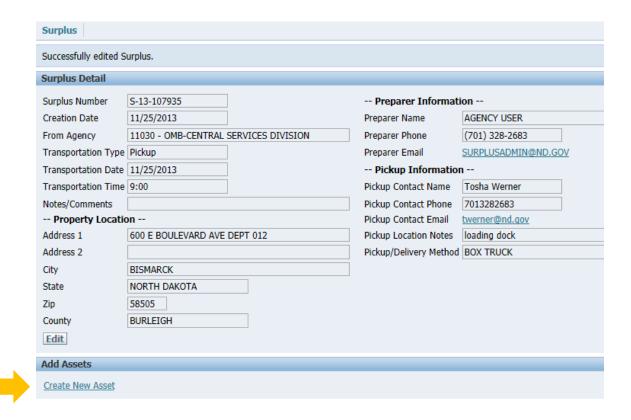
Pickup Location Notes: Add any additional location notes.

Pickup/Delivery Method: Choose a method from the drop down list.

Surplus Detail

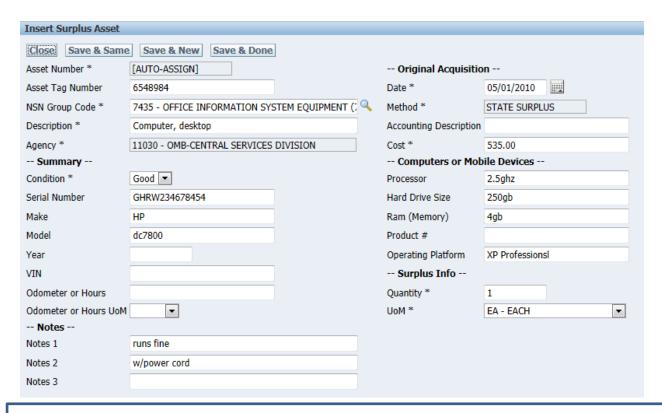
Once a Surplus is created, the user is taken to the Surplus Detail screen.

*Note: If the Surplus Transfer Detail needs to be updated, click the Edit button to make those changes.



Adding Asset/Property to a Surplus

To add the assets/property to the Surplus, click the **Create New Asset** link.



Remember: Please add as much detail as possible about the asset. This not only helps the Surplus staff, but will also help in the redistribution/sale of the asset.

Asset Tag Number: If this is a state asset that is tagged, enter that number in this field.

NSN Group Code: The NSN Group Code is the category grouping for the property. You can either start typing in the box or click on the magnifying glass to see all the codes available. A list of commonly used codes is available at the end of this guide.

Description: Enter the description of the property. Examples: Desk, wood; Computer, laptop; File; Monitor, 20"

Condition: Enter the condition of the property.

Good – Usable without repair
Fair – Usable, may need repair
Poor – Will need major repairs
Scrap – Material content value only

*Note: If Fair or Poor, list what is wrong with the property in the Notes.

Serial Number: Enter the serial number of the property.

Make: Enter the make of the property.

Model: Enter the model of the property.

Model Year: Enter the model year of the property.

VIN: If a vehicle is being surplused enter the VIN number of the property.

Odometer or Hours: If vehicle or the like is being surplused, enter the odometer mileage or the number of hours on the equipment.

Odometer or Hours UoM: Select unit of measure, either miles or hours.

Notes 1: Enter any additional notes concerning the property.

Notes 2: Enter any additional notes concerning the property.

This information will be available for viewing while shopping the property online.

Notes 3: Enter additional notes about the property. Example: desk measures 48" x 32", or file cabinet has 4 drawers

Date: Enter the original acquisition date of the property.

Accounting Description: Leave this field blank.

Cost: Enter the acquisition cost of the property.

Processor: Enter the Processer type.

Hard Drive Size: Enter the Hard Drive Size.

Ram (Memory): Enter the amount of ram or memory that is in the device.

Product #: Enter the product number provided by the manufacturer.

Operating Platform: Enter the operating platform.

Quantity: Enter the total quantity of property.

*Note: If the quantity is more than 1, the items must be identical and not have serial numbers (serialized inventory). If not, perform a Save & Same to duplicate the asset and change serial number as necessary.

UoM: This is the Unit of Measure field that defaults to EA – Each. User can use the drop down list to choose other available Units of Measure.

Once all data has been entered for the applicable fields, users have four options at the top of the Insert Surplus Asset screen:

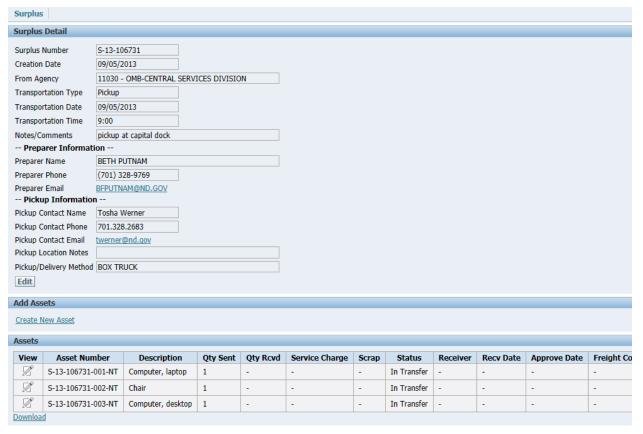
Close - Window will close and all data that has been entered will be lost.

Save & Same - Saves the asset and creates copy of asset details for easy entry of a similar asset.

Save & New - Saves the asset and allows immediate entry of another asset.

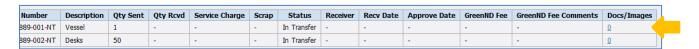
Save & Done - Saves the asset and closes the Insert Surplus Asset screen. User will be taken back to the Surplus Detail. If there are more assets/property to add, follow the same process by clicking Create New Asset.

*Note: Saved assets cannot be edited. The asset must be removed and added from scratch. See Remove Assets section of this manual.

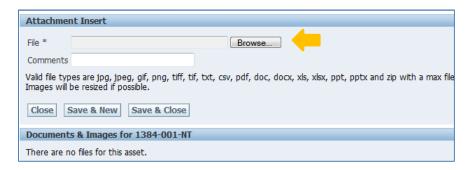


Adding Images

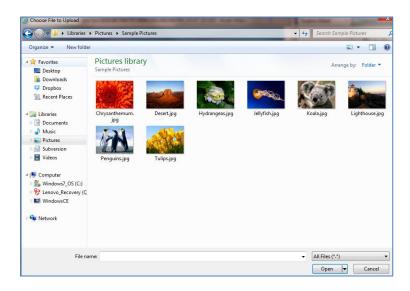
Once the asset/property has been added to the Surplus, users can attach/upload a picture for each asset using the Docs/Images section next to each asset. Click the 0 under the Docs/Images header next to the asset. An Attachment Insert window will open.



Click the Browse button to search where the documents or images are located on the computer.

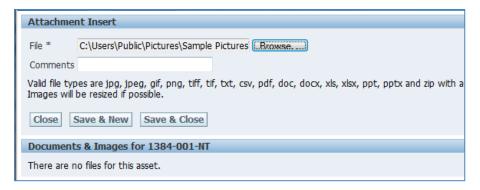


Choose the location where the document/image is located. Double click on the document/image. Or select the document/image and click open to add the document/image to the asset.

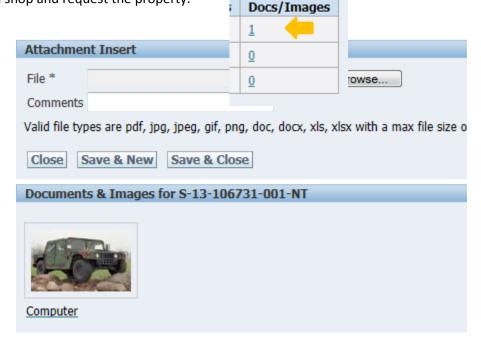


You may enter a comment (ex: Computer) to further detail the picture.

Then choose either: Close, Save & New (to add more documents or images for this asset only) or Save & Close (when finished).



Users will now be able to see that a document/image was added to the asset. Clicking on the quantity number will open the attachment window and show the document/image and comment(s). These images will be displayed on Web Surplus to users can shop and request the property.



Users may click on the document/image to open an image detail screen. In the image detail screen the document/image may be deleted if needed.

Removing Assets from Surplus

To remove an asset once it has been added to the Surplus Transfer, click the **Remove Asset** button. The Create New Asset section changes to Remove Assets and allows you to select the asset number to remove.

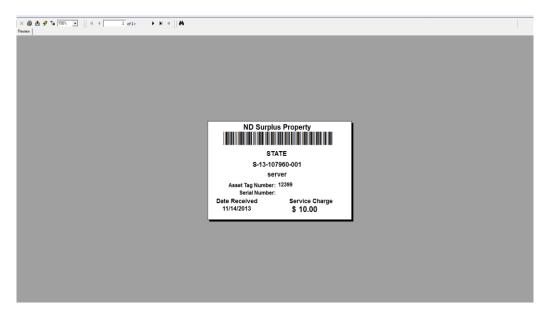


Print Labels

Print labels via the **Print Labels** button and attach the printed label to the property you are disposing of.

A report window will open. Once the label appears on the screen, click the print icon to print the label(s). Each label will print on a separate 8.5"x11" page. If the item entered has a quantity greater than 1 for an asset, print an additional copy for each identical asset and affix the label to the property. Example: you are disposing of 5 keyboards that are identical, they all have the same asset number assigned, print 5 labels and affix 1 label to each keyboard.

*Note: Reports require Crystal Report ActiveX Viewer to be installed the first time a report is run. There is an Installing Crystal Report ActiveX reference sheet at the end of this guide. If you are unable to install the ActiveX, please contact your IT department.



- **Note: To print labels, users must use Internet Explorer and have the bar code fonts installed. The fonts needed are Gill Sans TT, Free 3 of 9 Extended, and Free 3 of 9 Regular. There is an Installation of Fonts for Barcode Labels reference sheet at the end of this guide. Contact your IT department for assistance with installing these fonts.
- ***Note: Depending on the properties of your printer, you may have to change the paper type to Letter or 8.5"x11" when printing the label for it to print properly.
- ****Note: Each evening an email is sent to the designated Surplus Property Liaison for your agency. This email will inform the liaison that a Surplus Transfer is pending their approval.

Approving Surpluses

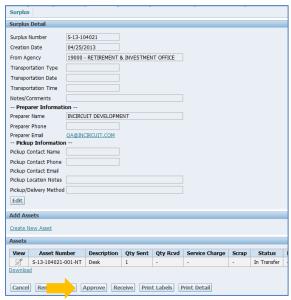
To approve a Surplus Transfer, the designated Surplus Property Liaison will need to click on the Transfers tab and either type the surplus number in the Surplus Number field or use the Search Surplus region. If using the Search Surplus region, choose your agency in the From Agency field; change the Status to Waiting for Approval, then click the Search button.



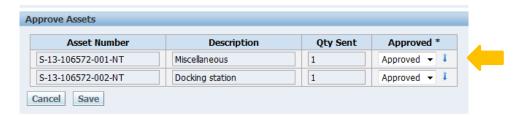
Once the surplus transfer is found, click the View button to be taken to the Surplus Transfer detail.



On the Surplus Transfer Detail screen, review asset(s) listed to ensure they are correct, and then click the Approve button at the bottom of the screen.



Approvers will be taken to the next screen where they will need to change the Approved field via the drop down list next to each asset listed. Click the Approved drop down list and chose either Approved or Rejected.



If there are several assets on the Surplus transfer, users can use the blue arrow next to the Approved to do a "apply all". Once the correct status is selected, the system will copy that status to every asset. Once the correct approved status is selected, click the Save button.

Reports

Designated Surplus Property Liaisons will have access to the Reports Tab.



The Surplus Transfer Report can be run by clicking on the red arrow.

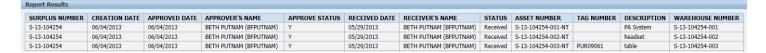


Surplus Transfers

Surplus Transfers



Run the report by entering a Surplus Number, Start and End Date, or leave the search fields blank for all asset disposal details for the Agency. This report can be downloaded to Excel or printed to PDF.



Web Surplus

View all available surplus property from our on-line shopping portal, Web Surplus. The link can be found at http://www.nd.gov/surplus/property/ click on 'North Dakota State Surplus Property'.

Viewing/Searching Items in Web Surplus

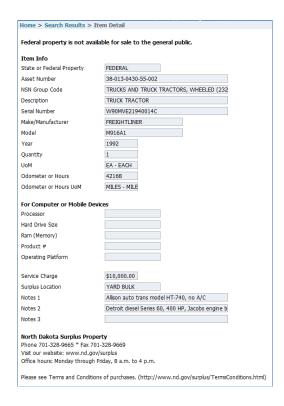
From the Home screen, Web Surplus allows a search or narrowing down of available property by clicking the View All Items button, clicking on a category of items, or performing a keyword search. The system will show all active state and federal property. The User can sort items by clicking on the column header.





View Item Details

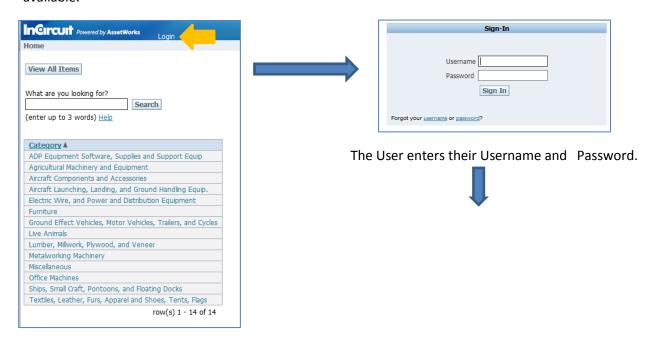
Click on the item image or description to "drill" down to the details about the item.

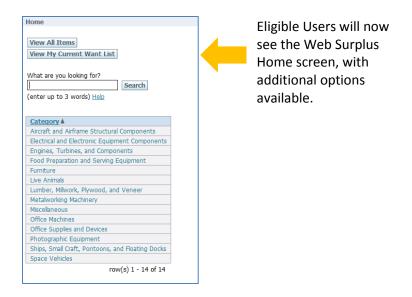


Logging into Web Surplus

Authorized users can <u>Login To Web Surplus</u>, <u>https://web7.incircuit.com/eams4/f?p=1043:1500</u>, by clicking the Login link at the top of the page.

*Note: Only approved buyers for an eligible organization (State agencies, political subdivision, schools, etc.) will be granted logins. Approved users can view and request available property based on their assigned priority screening level. Registered users can also create a user definable want list to be notified when specific types of property become available.





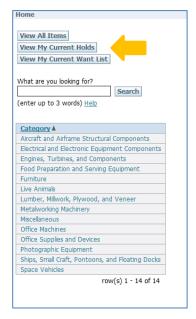
Placing Items on Hold

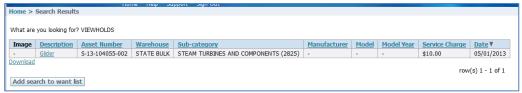
Place items on hold by clicking the Hold Asset button found within the item details.



*Note: Upon approval of the hold request from Surplus Property Staff, held property must be picked up at the property location within 5 business days.

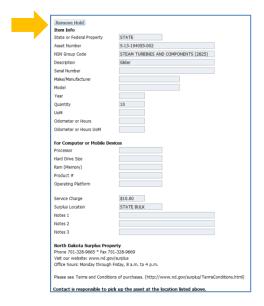
Users can see all their current hold assets from the Home Screen.





Removing Items from Hold

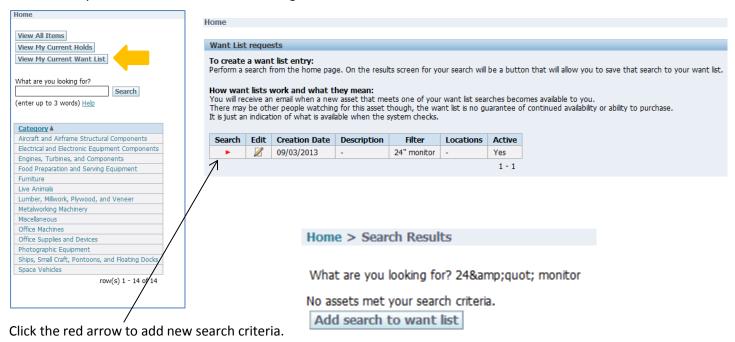
Remove an asset's hold status by clicking 'View My Current Holds' from the Web Surplus Home page. Click on the Asset you wish to remove the hold from and click 'Remove Hold'.



Create a Shopping List (Wants)

Authorized users can create a customized list of wanted items using the Want List feature. Use keywords to define the type of item you are looking for. When items with those keywords are received at Surplus Property you will receive an email notification.

Click View My Current Want List to view existing lists or create a new list.



Support

For questions and/or other support, please click the Support link.

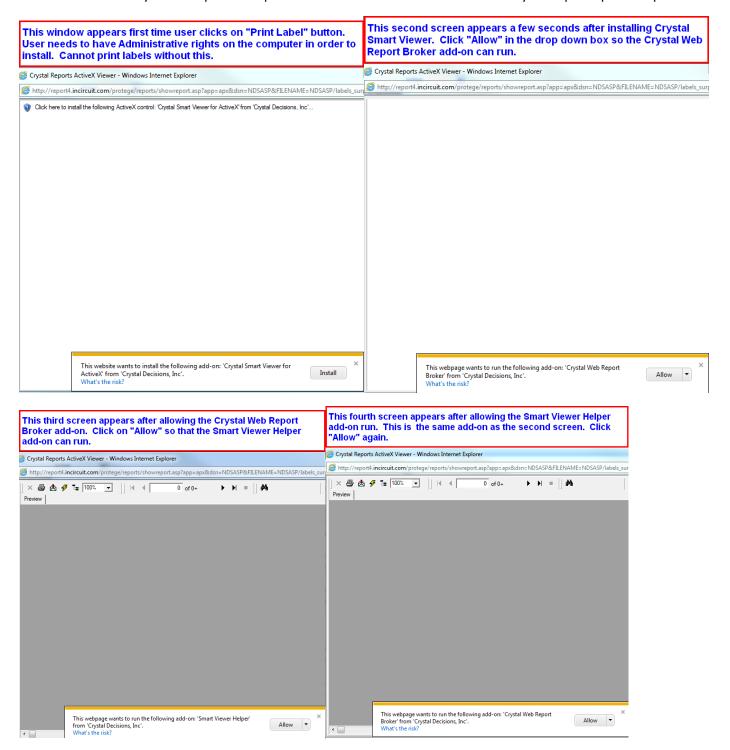
Home Help Support Sign Out

Fill out the form and click Send Email and someone will contact you.

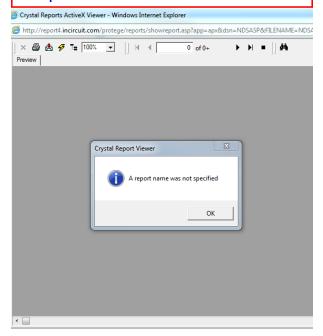


Installing Crystal Report ActiveX

Have someone from your IT Department perform the below installations and re-run your report upon completion.



Final screen appears stating "A report name was not specified". Click Ok. Close this window and click the "Print Label" button again. You should now see the label with the information you entered and a barcode. If you see numbers instead of a barcode, please install the barcode fonts from the Surplus website.



Installation of Fonts for Barcode Labels for Windows 7

User must have Administrative Rights on their computer in order to install these. Contact your IT Department if you don't have access or need assistance with the below instructions.

Download Barcode Label Fonts

- 1. Download the fonts from Surplus Property Website at http://www.nd.gov/surplus/forms/
 - a. Click Barcode Fonts Zip File
 - b. When prompted, choose Save File.
 - c. When the Save As dialog box opens, choose where to save the file. *Make sure you note the location of where you are saving it.
 - d. When done saving, choose Open.
 - e. Proceed to Install Barcode Label Fonts below

Install Barcode Label Fonts

Perform the below steps to install the following fonts; FRE3OF9X, FREE3OF9, and GILL____.

- 1. Click Start
- 2. Click Control Panel
- 3. Click on Appearance & Personalization
- 4. Click on Fonts
- 5. Double click on the first font to install
- 6. Click Install
- 7. Window will appear saying "installing name of font"
- 8. When it's done the Install button is grayed out
- 9. Close Font window
- 10. Login to AssetWorks
- 11. Find an asset
- 12. Click "Print Label" button from the Asset Detail screen and you should now see a barcode instead of the numbers.

Other Resources: Below is a website that shows an example of what the screen looks like to install the fonts. It also gives directions on how to install for XP, Vista, and Windows 8.

http://www.microsoft.com/typography/truetypeinstall.mspx

Commonly Used NSN Group Code

| Description | NSN Number |
|--|------------|
| Accounting & Calculating Machines | 7420 |
| Athletic & Sporting Equipment | 7810 |
| Books & Pamphlets | 7610 |
| Cabinets, Lockers, Bins, & Shelving | 7125 |
| Cameras, Motion Picture | 6710 |
| Cameras, Still Picture | 6720 |
| Floor Polishers & Vacuum Cleaning Equipment | 7910 |
| Food Cooking, Baking & Serving Equipment | 7310 |
| Footwear, Men's | 8430 |
| Footwear, Women's | 8435 |
| Garden Implements & Tools | 3750 |
| Headsets, Handsets, Microphones & Speakers | 5965 |
| Kitchen Equipment & Appliances | 7320 |
| Kitchen Hand Tools & Utensils | 7330 |
| Medical & Surgical Instruments, Equipment & Supplies | 6515 |
| Miscellaneous Vehicular Components | 2590 |
| Miscellaneous Machine Tools | 3419 |
| Miscellaneous Office Machines | 7490 |
| Office Devices & Accessories | 7520 |
| Office Furniture | 7110 |
| Office Information System Equipment | 7435 |
| Office Supplies | 7510 |
| Passenger Motor Vehicles | 2310 |
| Phonographs, Radios & Television Sets: Home Type | 7730 |
| Photographic Projection Equipment | 6730 |
| Printing, Duplicating Equipment | 3610 |
| Radar Equipment, Except Airborne | 5840 |
| Telephone & Telegraph Equipment | 5805 |
| Teletype & Facsimile Equipment | 5815 |
| Television Sets, Radios, Phonographs | 7730 |
| Tires | 2630 |
| Tool & Hardware Boxes | 5140 |
| Tractors, Wheeled | 2420 |
| Trailers | 2330 |
| Truck & Tractor Attachments | 3830 |
| Trucks & Truck Tractors, Wheeled | 2320 |
| Typewriters & Office Type Composing Machines | 7430 |
| Vehicular Furniture & Accessories | 2540 |